COVID-19 Community Team Outreach Tool

Case Patient Portal Workflow Guidance for CIs

The case patient portal will allow case patients to enter contacts on their phone or computer directly from their digital notification. Read on to understand how this may impact your work.

FOR ALL CIs: Case Investigation Work Alongside the Case Patient Portal

Due to the case portal, it is possible that a case patient may have accessed a digital notification, provided a symptom onset date, received a calculated end-of-isolation date, and entered info about their close contacts before you call them. **Consider the following impacts to your case investigation process.**

PRIOR TO CONDUCTING AN INTERVIEW:

- **If you are not working within CCTO,** be aware that it is possible your case patient may have already calculated an isolation date and provided contacts digitally. **You may connect with a contact tracer** to gather information from CCTO prior to making a call to the case patient.
- **If you are working within CCTO** (in addition to NC COVID), **proceed to the *Areas to Review Before Case Interview* section below** and adjust your interview plans appropriately based upon any information you find.

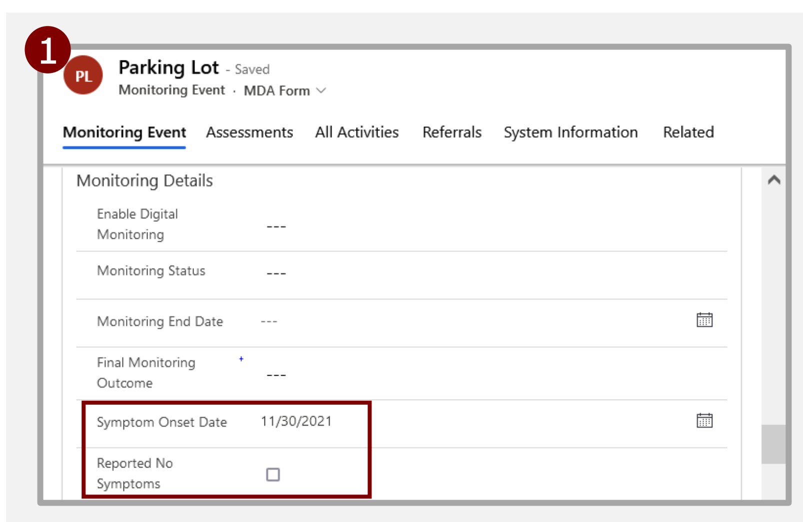
DURING AN INTERVIEW:

- **If you are not working in CCTO, per the above,** be aware that it is possible your case has entered contacts into the portal and/or calculated an end-of-isolation date and that you may need to adjust your interview accordingly.
- **If you are working in CCTO and your case has submitted information through the portal:**
  - Ensure that you **acknowledge any information** your case patient may have already submitted when introducing yourself and the purpose for your call.
  - Based upon the information you have reviewed and your conversation with the case patient, **determine what further discussion or verification of this information may be required** and whether further collection or adjustment of close contact information may need to happen over your call. *There is no need to use NC COVID to repeat the entry of any successfully submitted contacts*.
  - If you receive new information about a contact who was entered by your case through the portal, **ensure this contact's existing CCTO monitoring event is updated appropriately**.

FOR CIs WORKING WITHIN CCTO: Areas to Review Before Case Interview

If you are a CI working within CCTO, check the following areas before conducting your interview:

1. If your case patient has entered a symptom onset date or indicated no symptoms through the portal, you can review this in the ***Monitoring Details*** box on their monitoring event. *Later on, if you are ultimately unable to reach this case, you should incorporate any date submitted by the case here into their NC COVID record.*



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FOR CIs WORKING WITHIN CCTO: Areas to Review (cont'd.)

2. You can also locate any contacts your case patient has provided and review their information:
   - To see all accepted and non-accepted contact submissions by your case, visit the **Case Portal Submissions Tab** and filter the **NC COVID Event ID of Case** column (within the default *All Case Portal Submissions* view). This will show both accepted and non-accepted contact submissions made by your case through the portal per the job aid.
   - To see only created contact monitoring events associated with your case, visit the **Monitoring Events Tab** and search your case's 9-digit **NC COVID Event ID** (within a view that includes all contact MEs).
3. As a special note, contacts submitted by case patients may also display extra detail entered into the portal by the case in the **Notes Provided from Case Patient on Online Case Portal** section on contact monitoring events.

After reviewing all the information listed in this section, take careful note of how you wish to proceed with your interview and information gathering. Proceed appropriately. *There is no need to use NC COVID to repeat the entry of any contacts who were successfully submitted to CCTO via the case patient portal.*